CPA Practice Advisor

Robert Westley, CPA, PFS, CFP®

Vice President & Wealth Advisor, Northern Trust

After my time with Deloitte, I became a Vice President and Wealth Advisor at Northern Trust in the Greater New York region. At Northern Trust, I serve as a lead relationship manager specializing in the financial management and wealth planning needs of ultra-high net worth individuals and their families. It's been a privilege to provide successful families with integrated wealth planning advice encompassing all areas of their financial life including estates and trusts, lifetime and testamentary wealth transfer, philanthropy, investments, cash flow, and risk management.

I've also been fortunate to work with the financial media as a wealth management and tax expert and have been featured in the Wall Street Journal, New York Times, Washington Post, Chicago Tribune, CNBC, Market Watch, USA Today and other outlets. Additionally, I've authored many articles and columns for professional journals such as the Journal of Financial Planning, Journal of Accountancy, and The Tax Adviser.

What are you doing to make a difference in the profession, your community, the world?

I'm passionate about advancing the financial planning education and knowledge of clients, advisors, and the public. I currently volunteer as a member of the AICPA's National CPA Financial Literacy Commission. The commission leads the CPA profession in a national effort to advance the financial literacy of Americans. As a volunteer, I work to raise awareness of the importance of financial literacy education, help to build liaisons within the financial literacy community, and serve as a media spokesperson promoting financial literacy. I also volunteer my time in advancing the knowledge of younger financial planners through my work on the PFS Credential Committee and the American College of Financial Services NextGen Advisory Board.

Favorite books/websites/speakers that you find influential

provide customized and objective oversight of all their financial, investment, and tax matters.

What accounting conferences do you normally attend?

I attend AICPA Engage and the Heckerling Institute on Estate Planning.

What websites/magazines do you use to keep up on news of the accounting profession?

Tax Adviser, Trusts & Estates, Journal of Accountancy, Journal of Financial Planning, Financial Planning Digest and CPA Practice Advisor.

See all of the “40 Under 40” honorees for 2019.

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